INTEGRATED BILLING
INGENIX CLAIMSMANAGER™ INTERFACE

INSTALLATION GUIDE

IB Version 2.0
Patch IB*2.0*161

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V*IST***A** Technical Services
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Introduction

This document will explain how to install the ClaimsManager interface software into VistA. It will also explain some of the settings that need to be made in the ClaimsManager Monitor process. The Monitor process handles all TCP/IP communications with VistA.

There are two main parts to this installation. First, you must install and configure the ClaimsManager application. Second, you must install and configure the interface software which resides on VistA.

Requirements

ClaimsManager™

It is assumed that the ClaimsManager server is completely set-up. This means that the server is running, the ClaimsManager application has been installed, and the server is physically connected to the network such that it is accessible to the VistA server through network connections over TCP/IP. It is also assumed that the reader can log into ClaimsManager.

The TCP/IP address of the ClaimsManager server must be known. This address is in the format of four numbers separated by periods. Each number can be between 0 and 255. For example, 1.160.15.240 could be a TCP/IP address.

It is also assumed that the reader has read the Ingenix document entitled, "Rule Process Monitor Setup & Configuration." This document describes in detail the ClaimsManager Monitor Process and the Ingenix Event Manager services. Of course, it has no information about the specific configuration needed for the interface with VistA.

VistA

Here is the list of required VistA patches that must be installed before the ClaimsManager Interface software can be installed. If one or more of these patches has not been installed yet, then you may still configure the ClaimsManager Monitor process, but you will not be able to install or use the ClaimsManager Interface software.

Required Builds

IB*2.0*128
IB*2.0*137
IB*2.0*151

Installation Overview

As previously indicated, there are 2 main parts to this installation – the ClaimsManager part and the VistA part. These do not need to be performed at the same time, but both must be done before the interface will work. This section of the document will simply list all of the steps involved in the installation of both the ClaimsManager part and the VistA part.

ClaimsManager™

Step 1: Stop the Ingenix Event Manager services (if they are running)
Step 2: Configure the ClaimsManager Monitor Process[1]
Step 3: Re-start the Ingenix Event Manager services
Step 4: Turn off the Referring Provider edits (REF) within ClaimsManager
Step 5: Define the User Defined Fields

[1]A note regarding ClaimsManager Step 2 – Configuring the Monitor process:

> This step only needs to be done once, not each time that the ClaimsManager client is installed on a workstation. The ClaimsManager Monitor process runs on the server. It needs to be configured after ClaimsManager is installed on the server.

VistA

Step 1: Install the KIDS file
Step 2: Build the ClaimsManager NPT file and the Payor file
Step 3: Import these two files into ClaimsManager
Step 4: Add the Assign ClaimsManager Bill option to selected user's menus
Step 5: Modify the IB Site Parameters file to include the ClaimsManager information
Step 6: Identify appropriate users and allocate the ClaimsManager security keys

Installation Detail

ClaimsManager™ Step 1 – Stop Services

Stop the Ingenix Event Manager services (if they are running)

It is necessary to stop these services prior to making any changes to the Monitor process. This can be done from the Windows Control Panel → Services icon. To see if the Ingenix Event Manager services are running and to stop them, go to Start → Settings → Control Panel. Double-click on the Services icon and look for the Ingenix Event Manager service. See Figure 1 below.

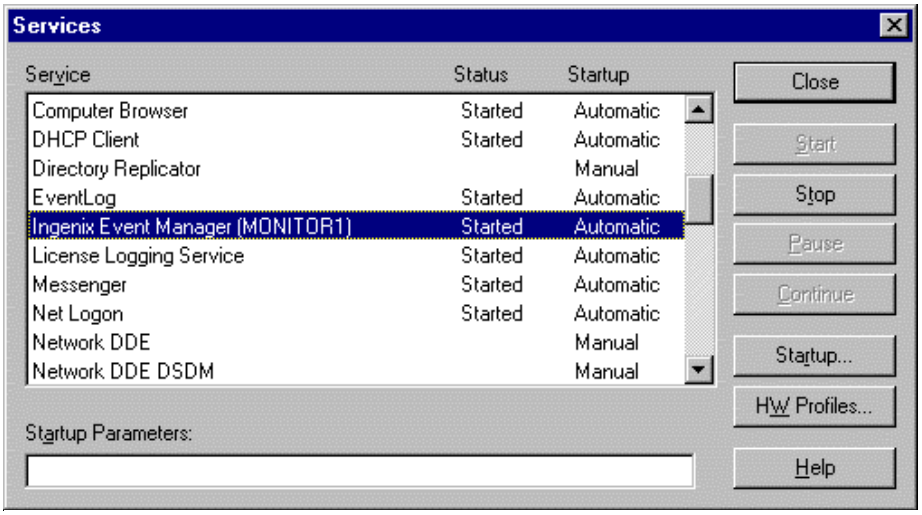

Figure 1

If the Status of the Ingenix Event Manager is Started, then highlight it and click Stop to stop it.

ClaimsManager™ Step 2 – The Monitor

Configure the ClaimsManager Monitor Process

Log into ClaimsManager. Click the "+" sign next to Monitor and the "+" sign next to View. Double-click on the Settings. Figures 2 and 3 below are ClaimsManager screens.

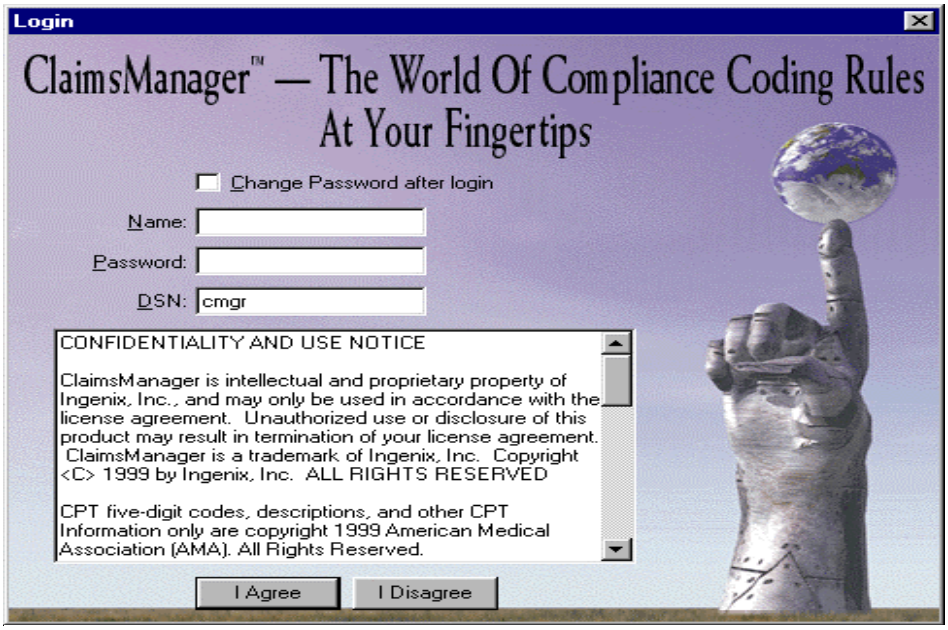

Figure 2

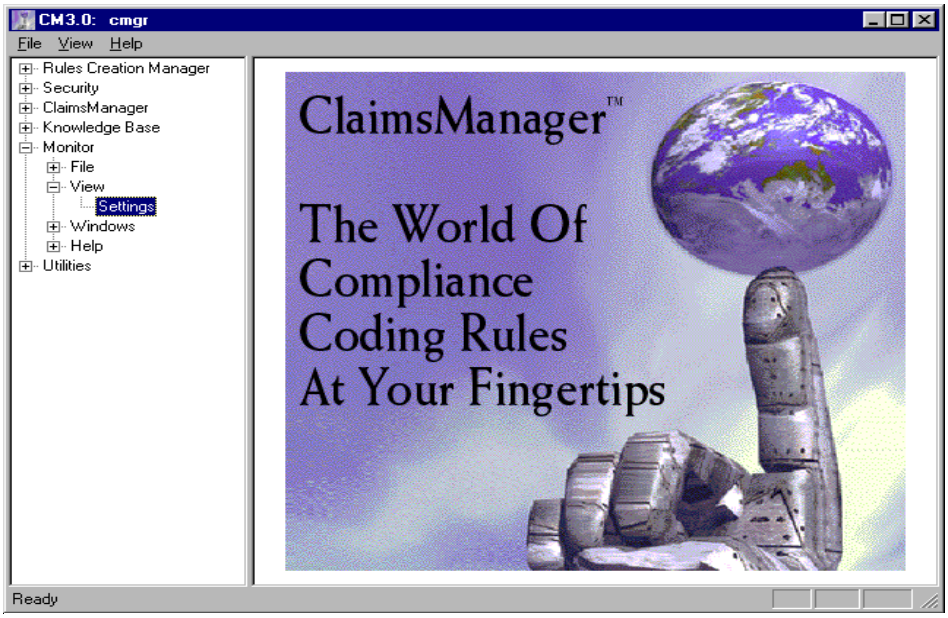

Figure 3

Figure 4. This will bring you to the Monitor Settings and the Properties tab should be displayed. For the purposes of the VistA – ClaimsManager Interface, it is required to configure one monitor process and several connection processes.

Make sure that the Monitor Path is correct and, most importantly, enter the IP address of the ClaimsManager server. In the below example, this IP address is 10.17.1.234 which is defined as an internal IP address – one that is only valid within a private network of computers. Whatever is entered here should also be entered into VistA so the two systems can communicate.

The following figure is a ClaimsManager screen.

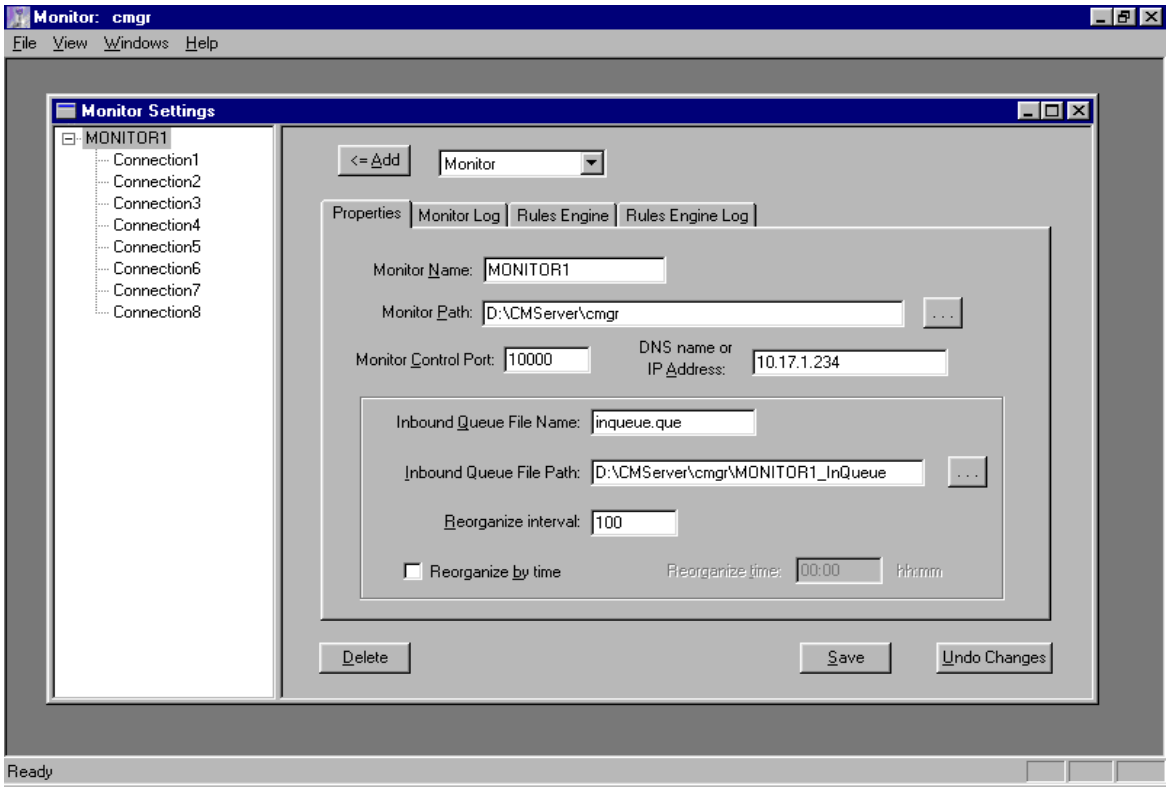

Figure 4

Figure 5. In the Monitor Log tab of the Monitor Settings, you can define the name and location of the ClaimsManager Monitor Log file. You can also determine which options you can check for informational logging purposes. Unless you are troubleshooting a specific problem, most of these check boxes can be cleared. It is a good idea to leave the checks next to Warning and TCP/IP. ClaimsManager will automatically record these types of transactions in the log file and this can be used for support and troubleshooting purposes.

The following figure is a ClaimsManager screen.

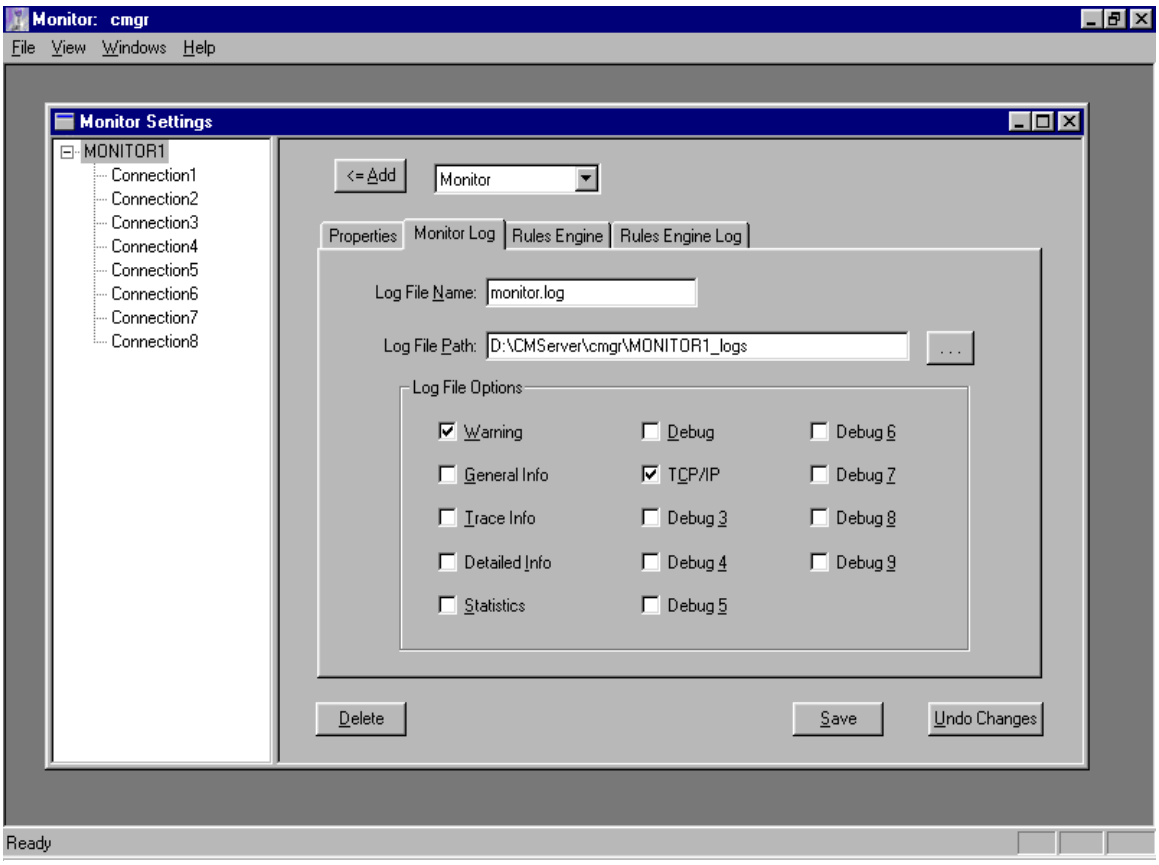

Figure 5

Figure 6. This section deals with configuring the Connection processes. Ingenix has indicated that three of the Connections should be defined for internal ClaimsManager purposes. The remaining connections are used to receive and send data to and from VistA. It is these connections that will be discussed here. In the below example, Connections 1 through 3 are not being used for the interface purposes. Connections 4 through 8 are being used for the interface. Therefore, we have defined five specific port numbers through which data can be transmitted using TCP/IP.

As a matter of convention, the listen port number used for each connection is 100n0, where n represents the connection number. For example, Connection 5 uses listen port number 10050, Connection 6 uses listen port number 10060, and so forth. Each connection must have a unique listen port number.

For the interface to function correctly, it is important that all connections which will be used for the interface be configured the same. The Default Result Type must be "Results". There must be a check next to "Return Deleted Claims" and next to "Return All Results". The check boxes next to "GUI Connection" and "Build Claims" must be cleared. All other fields may accept the defaults.

The following figure is a ClaimsManager screen.

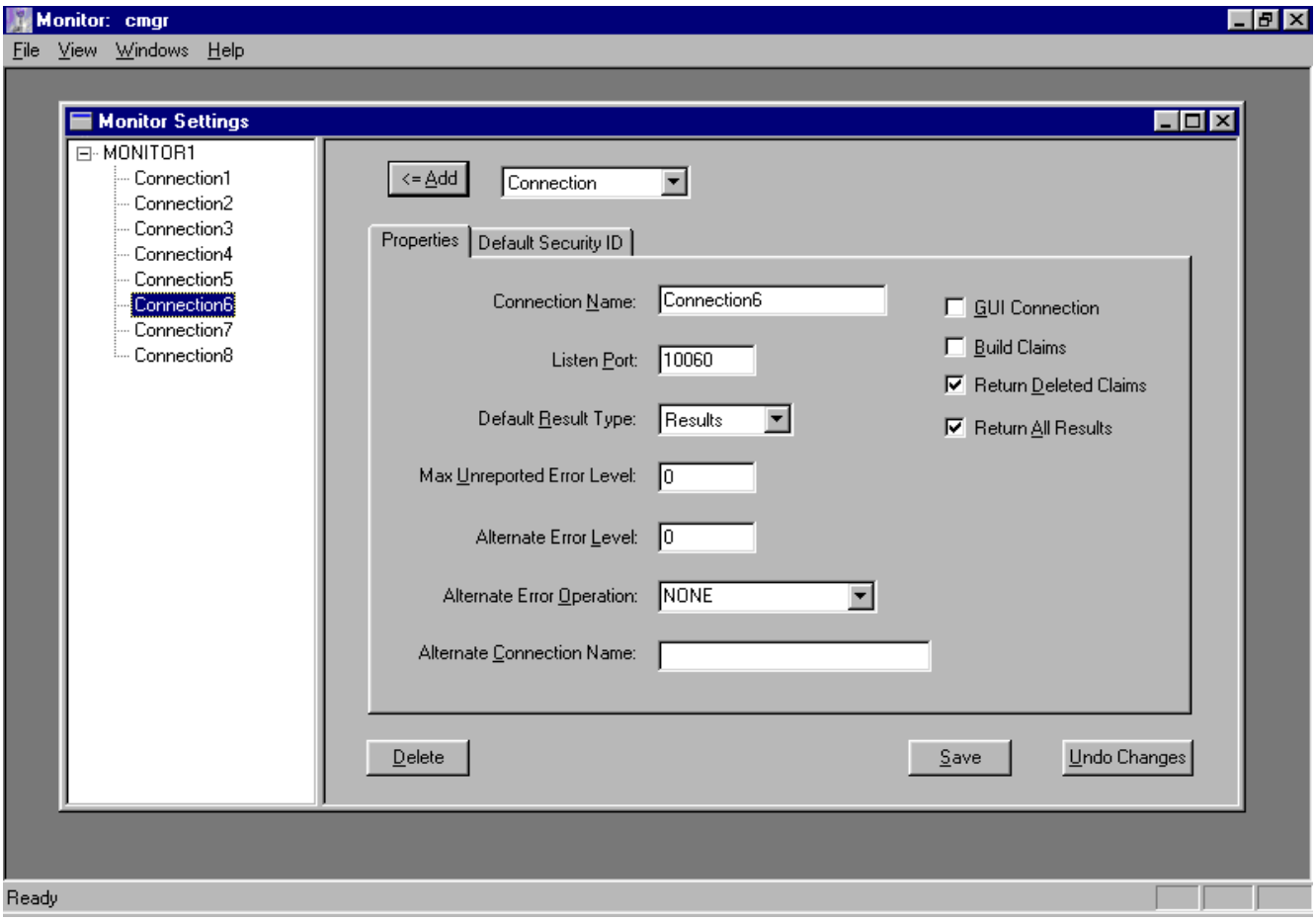

Figure 6

ClaimsManager™ Step 3 – Start Services

Re-start the Ingenix Event Manager services

This is the exact reverse of ClaimsManager Step 1. After the Monitor and Connections have been configured, it is necessary to re-start the Ingenix Event Manager services. What you are doing here is telling ClaimsManager to start listening for TCP/IP messages from VistA on those port numbers that you specified in ClaimsManager Step 2.

ClaimsManager™ Step 4 – REF Edits

Turn off the Referring Provider edits (REF) within ClaimsManager

This is an item that is specific to this interface project. At the present time, the VistA-ClaimsManager interface is not sending any VistA referring provider information to ClaimsManager. The referring provider fields are identified as optional fields within the ClaimsManager interface. However, ClaimsManager produces an error message whenever the referring provider information is not sent. Therefore, it is necessary to turn the REF edit within ClaimsManager OFF.

This is an item that needs to be done with the assistance of the Ingenix training consultant.

ClaimsManager™ Step 5 – User Defined Fields

Define the User Defined Fields used in this interface within ClaimsManager

The following data elements have been included with the interface as user defined fields from the ClaimsManager point of view. They are automatically included with every claims transmission to ClaimsManager.

1. Is this claim a sensitive record? Y or N
2. Name of the VistA Coder
3. Name of the VistA Biller
4. Type of Insurance Plan Abbreviation (taken from VistA file# 355.1)

This is an item that needs to be done with the assistance of the Ingenix training consultant.

VistA Step 1 – KIDS

Install the KIDS file

The ClaimsManager interface software has been assigned IB patch number 161. Therefore, the name of the build is IB*2.0*161.

Two Mail Group names are being released with this interface software. They are IBCI GENERAL ERROR and IBCI COMMUNICATION ERROR. The installer will be asked to enter the Coordinator for these Mail Groups upon the installation of this interface software.

The installation of this KIDS file should be done in accordance with normal KIDS installation procedures. Presented below is some text captured during a sample installation.

```
Select Kernel Installation & Distribution System Option: Installation

  <TEST ACCOUNT>  1      Load a Distribution
  <TEST ACCOUNT>  2      Verify Checksums in Transport Global
  <TEST ACCOUNT>  3      Print Transport Global
  <TEST ACCOUNT>  4      Compare Transport Global to Current System
  <TEST ACCOUNT>  5      Backup a Transport Global
  <TEST ACCOUNT>  6      Install Package(s)
  <TEST ACCOUNT>         Restart Install of Package(s)
  <TEST ACCOUNT>         Unload a Distribution

 <TEST ACCOUNT> Select Installation Option: 6  Install Package(s)
Select INSTALL NAME: IB*2.0*161       Loaded from Distribution  4/17/02@13:44:21
     => ClaimsManager Interface, March "C" release  ;Created on Mar 27, 2002@1

This Distribution was loaded on Apr 17, 2002@13:44:21 with header of
   ClaimsManager Interface, March "C" release  ;Created on Mar 27, 2002@14:00:01
It consisted of the following Install(s):
     IB*2.0*161
Checking Install for Package IB*2.0*161

Install Questions for IB*2.0*161

Incoming Files:


   350.9     IB SITE PARAMETERS  (Partial Definition)
Note:  You already have the 'IB SITE PARAMETERS' File.


   351.9     CLAIMSMANAGER BILLS


   351.91    CLAIMSMANAGER STATUS  (including data)

Incoming Mail Groups:

Enter the Coordinator for Mail Group 'IBCI GENERAL ERROR':

Enter the Coordinator for Mail Group 'IBCI COMMUNICATION ERROR':

Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//

Want KIDS to INHIBIT LOGONs during the install? NO//

Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES// YES

Enter options you wish to mark as 'Out Of Order': IB EDIT BILLING INFO

Enter options you wish to mark as 'Out Of Order':

Enter protocols you wish to mark as 'Out Of Order':

Delay Install (Minutes):  (0-60): 0//

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
```

```
Enter a '^' to abort the install.

DEVICE: HOME//

 Install Started for IB*2.0*161 :
               Apr 18, 2002@12:03:01

Build Distribution Date: Mar 27, 2002

 Installing Routines:
               Apr 18, 2002@12:03:04

 Installing Data Dictionaries:
               Apr 18, 2002@12:03:06

 Installing Data:
               Apr 18, 2002@12:03:06

 Installing PACKAGE COMPONENTS:

 Installing SECURITY KEY

 Installing INPUT TEMPLATE

 Installing MAIL GROUP

 Installing PROTOCOL
  Located in the IB (INTEGRATED BILLING) namespace.
  Located in the IB (INTEGRATED BILLING) namespace.
  Located in the IB (INTEGRATED BILLING) namespace.
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  Located in the IB (INTEGRATED BILLING) namespace

 Installing LIST TEMPLATE

 Installing OPTION
               Apr 18, 2002@12:03:15

 Running Post-Install Routine: ^IBCIPOST
 Updating Routine file...

 The following Routines were created during this install:
     IBXSC3
     IBXSC31
     IBXSC310
     IBXSC311
     IBXSC32
     IBXSC33
     IBXSC34
     IBXSC35
     IBXSC36
     IBXSC37
     IBXSC38
     IBXSC39
     IBXSC6
     IBXSC61
     IBXSC610
     IBXSC611
     IBXSC612
     IBXSC613
     IBXSC614
     IBXSC615
     IBXSC62
     IBXSC63
     IBXSC64
     IBXSC65
     IBXSC66
     IBXSC67
     IBXSC68
     IBXSC69
     IBXSC7
     IBXSC71
     IBXSC710
     IBXSC711
```

```
     IBXSC712
     IBXSC713
     IBXSC714
     IBXSC715
     IBXSC716
     IBXSC717
     IBXSC718
     IBXSC719
     IBXSC72
     IBXSC720
     IBXSC721
     IBXSC722
     IBXSC73
     IBXSC74
     IBXSC75
     IBXSC76
     IBXSC77
     IBXSC78
     IBXSC79

 Updating KIDS files...

 IB*2.0*161 Installed.
              Apr 18, 2002@12:03:17

Install Completed
```

VistA Step 2 – Extract Files

Build the ClaimsManager NPT file and the Payor file

These files are initial data extract files from VistA that should get created upon the ClaimsManager system installation and initialization. A new sub-menu option has been added to the System Manager's Integrated Billing Menu called Extract Data Files for ClaimsManager.

The ClaimsManager NPT file is also known as the New Patient History file. The name of this menu option is IBCI CLAIMSMANAGER NPT FILE. The menu text that gets displayed within a menu is Create ClaimsManager NPT File. This extract procedure will examine all bills within the last three years. It will extract those bills for which a valid HCFA Specialty code exists. The data elements in this file are patient SSN, HCFA Specialty code, and date of service.

The ClaimsManager Payor file is created through the use of the menu option named IBCI CLAIMSMANAGER PAYOR FILE. The menu text that gets displayed within a menu is Create ClaimsManager Payor File. This extract procedure will simply extract valid data from the VistA Insurance Company File (#36). The data elements extracted are the unique identifier and the Insurance Company name.

```
Select System Manager's Integrated Billing Menu Option: CLA  Extract Data Files
for ClaimsManager


   <TEST ACCOUNT>  NPT  Create ClaimsManager NPT File
   <TEST ACCOUNT>  PAY  Create ClaimsManager Payor File

Select Extract Data Files for ClaimsManager Option: NPT  Create ClaimsManager
NPT File

 This option is responsible for creating the NPT file
 (New Patient History) for the ClaimsManager application from Ingenix.

 A 3 year history is needed so this option will extract claims data
 from APR 26, 1998 through APR 26, 2001.

 This process may take several minutes.

 Do you wish to proceed? NO//
```

Figure 7

The preceding figure showed the menu option and the beginning screen of the NPT file creation option. The following figure shows the menu option and the beginning screen of the Payor file creation option.

```
Select System Manager's Integrated Billing Menu Option: CLA  Extract Data Files
for ClaimsManager


   <TEST ACCOUNT>  NPT  Create ClaimsManager NPT File
   <TEST ACCOUNT>  PAY  Create ClaimsManager Payor File

Select Extract Data Files for ClaimsManager Option: PAY  Create ClaimsManager
Payor File

 This option is responsible for creating the Payor File
 for the ClaimsManager application from Ingenix.  This
 is a listing of the Insurance Companies that are currently
 stored in VistA.

 Do you wish to proceed? NO//
```

Figure 8

Both of these files can be created and saved in any valid directory location. Read the information on the screens and access the on-line help for more information. These files will ultimately need to be imported into ClaimsManager so decide beforehand the method you want to use to facilitate this. You may choose to create these files such that they are accessible to ClaimsManager over the network or you may want to manually move these files to the ClaimsManager server after they have been created.

VistA Step 3 – Import Data

Import these two files into ClaimsManager

Log into ClaimsManager and go into the Utilities main menu option. Select Import Data and then either New Patients (NPT) or Payors depending on which file you are importing. The following two figures are ClaimsManager screens.

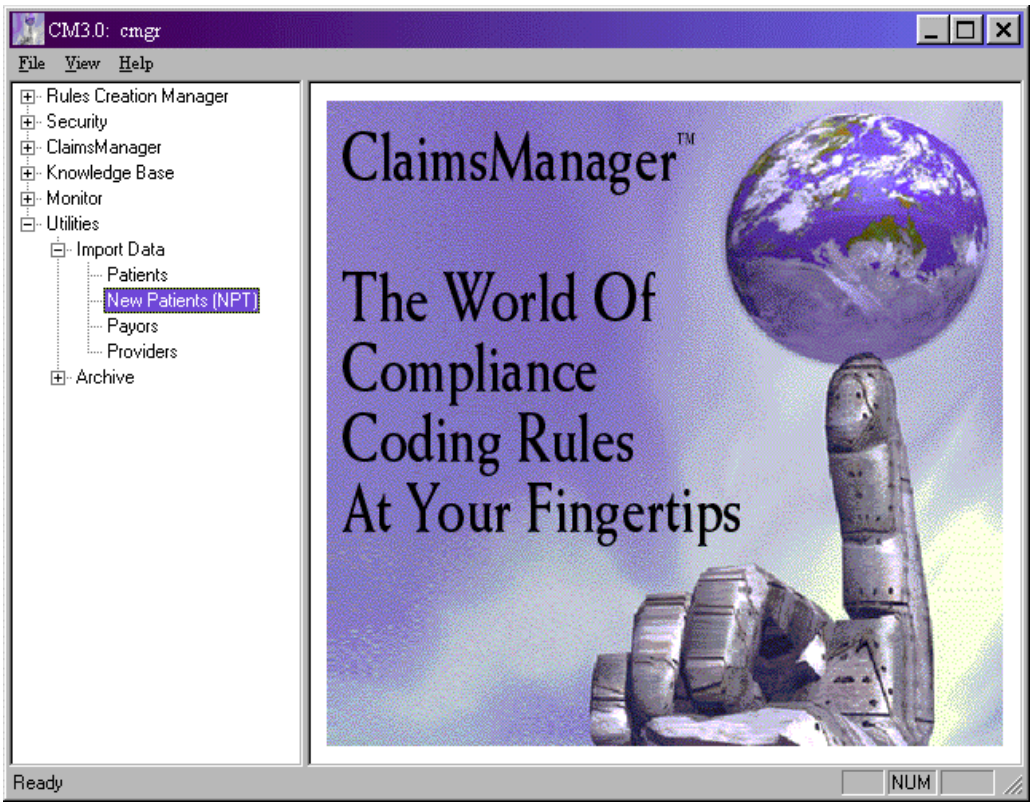

Figure 9

You must double-click on either New Patients (NPT) or on Payors. Upon doing so, ClaimsManager will ask for the location and filename of the ClaimsManager import file.

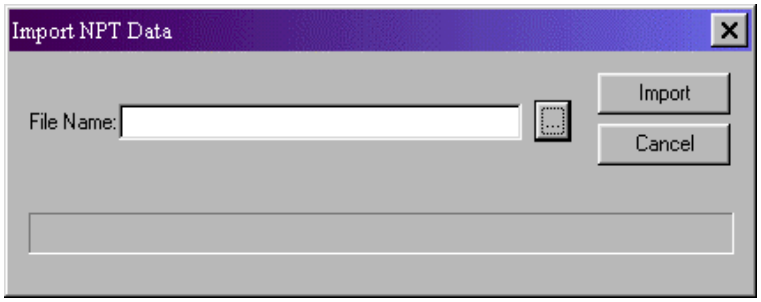

Figure 10

VistA Step 4 – Assign ClaimsManager Bill Option

Identify appropriate users and add this option to their menus

One option is being released as a stand-alone option. It is not being released as an item in any parent menu. The name of this option is IBCI ASSIGN CLAIMSMANAGER BILL and the menu text display is “Assign ClaimsManager Bill”. This option will be used primarily by coders to re-assign a ClaimsManager bill back to the billers. However, the use of this option is not restricted in any way to just coders. The users who will use this option are those users who do not typically have access to the IB functions or options and who may get bills assigned to them to resolve ClaimsManager errors.

VistA Step 5 – Parameters

Modify the IB Site Parameters file to include the ClaimsManager information

In order to modify the IB Site Parameters, you must have access to the option IBJ MCCR SITE PARAMETERS (the menu display name is MCCR Site Parameter Display/Edit). From the main MCCR Site Parameter screen, please choose to edit the IB Site Parameters.

The ClaimsManager parameters exist as parameter set number 16. They are shown in figure 11 on the following page.

In order for VistA to know about ClaimsManager and in order for any ClaimsManager processing to occur, the "Are we using ClaimsManager?" parameter must be set to YES.

The "Is ClaimsManager working OK?" parameter exists in order to temporarily disable the ClaimsManager interface in the event of system problems or other problems of unknown origin. When this is set to NO, bills may be immediately authorized without going through the ClaimsManager process. Later on, they may be re-sent through the interface process.

The ClaimsManager TCP/IP Address and TCP/IP Ports must match those that were configured during the set-up of the ClaimsManager Monitor process.

The mail groups associated with this interface should be those that came with the interface software. The names are listed below. The coordinator of these mail groups is responsible for populating them.

The MailMan Messages item simply controls whether the MailMan messages that get created and sent when a user is assigning a bill to another user are Priority messages or Normal messages.

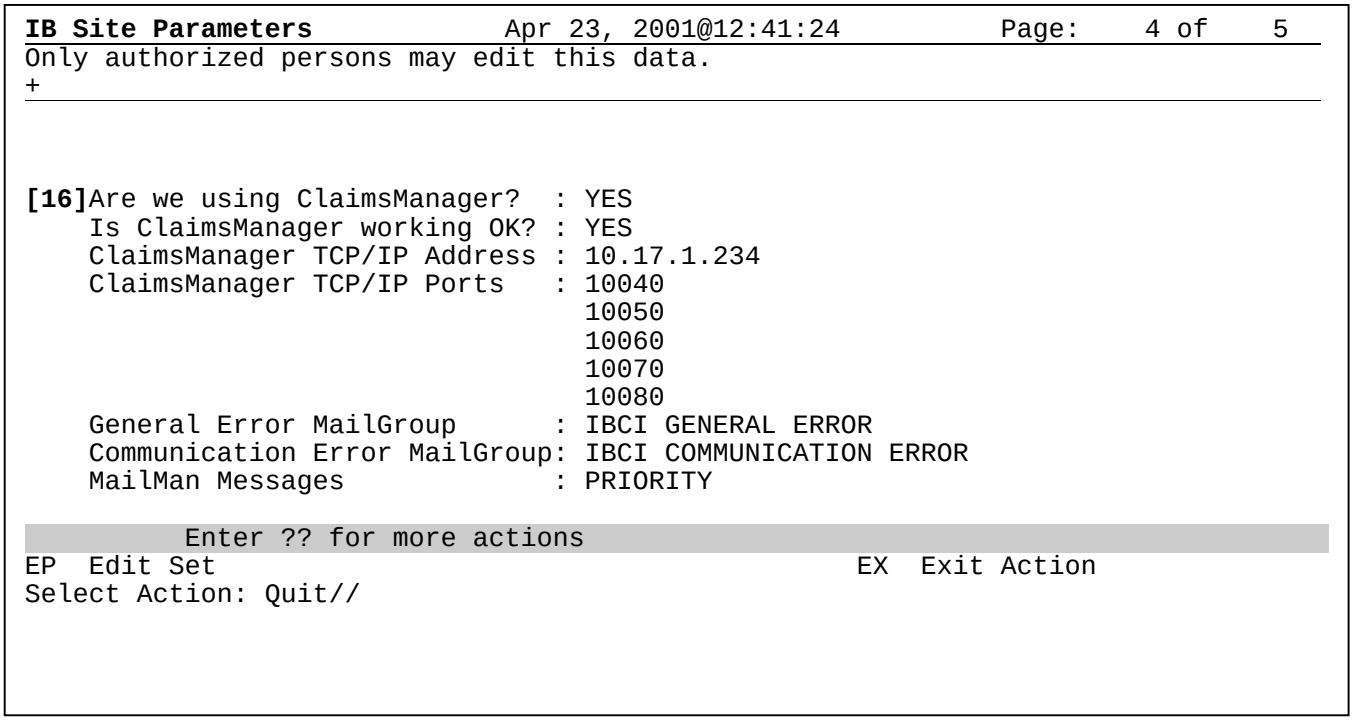
IB Site Parameters Apr 23, 2001@12:41:24 Page: 4 of 5
Only authorized persons may edit this data.
+
[16]Are we using ClaimsManager? : YES
Is ClaimsManager working OK? : YES
ClaimsManager TCP/IP Address : 10.17.1.234
ClaimsManager TCP/IP Ports : 10040
10050
10060
10070
10080
General Error MailGroup : IBCI GENERAL ERROR
Communication Error MailGroup: IBCI COMMUNICATION ERROR
MailMan Messages : PRIORITY
Enter ?? for more actions
EP Edit Set
EX Exit Action
Select Action: Quit//

Figure 11

VistA Step 6 – Security Keys

Identify appropriate users and allocate the ClaimsManager security keys.

The following security keys have been defined for this interface project.

Security Key: "IBCI CLAIMSMANAGER OVERRIDE"

The purpose of this Security Key is to allow the user that possesses this key to override the ClaimsManager errors and authorize the bill in spite of the errors found by ClaimsManager.

Of course, the act of authorizing a bill which has ClaimsManager errors eliminates the effectiveness and usefulness of the ClaimsManager product. Therefore, this key should not be given to everyone.

Security Key: "IBCI CM MULTIPLE CLAIM SEND"

The purpose of this Security Key is to allow access to the ClaimsManager Multiple Claim Send option. This option is used to send several claims to ClaimsManager at one time. The claims that are listed in this option are claims that previously skipped the ClaimsManager Interface process due to communication failures or other system problems.

Security Key: "IBCI CLAIMSMANAGER ASSIGN"

This Security Key is only used in the Assign ClaimsManager Bill option. Users who possess this key may assign any editable ClaimsManager bill to someone else. Users who do not possess this key may only assign those bills that are currently assigned to them.